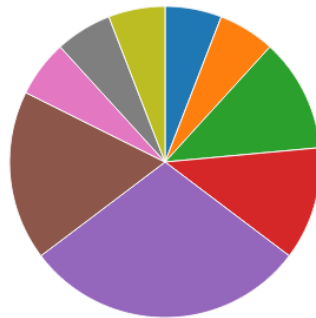


New Feature Description Analytic Reporting Tool PRO

Contents

IDENTIFY YOUR OWN RANGES FOR REPORT SUMMARIES..... 2

SEARCH ADDED FOR USER/GROUP SELECTION ON SHARING & SCHEDULING 6



Last updated: June 15, 2017

IDENTIFY YOUR OWN RANGES FOR REPORT SUMMARIES

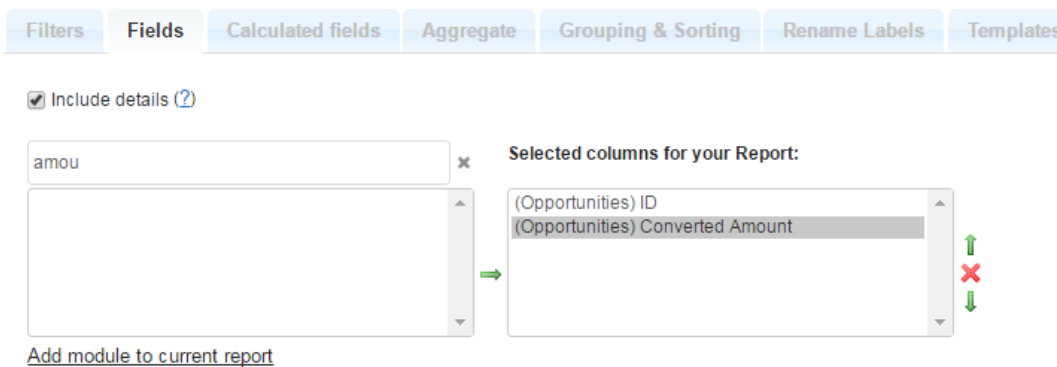
In some cases it is necessary to split your summary reports in certain ranges. For example, if you need to see how many deals do you have for up to \$100k; how many between \$100 -\$200k etc.

There is another case, often used for KPI reporting, when you set certain goals to be reached monthly or quarterly by your sales agents. This is a bit different case, as here you need to see, how total count or sum of an amount for each time period is allocated for each individual.

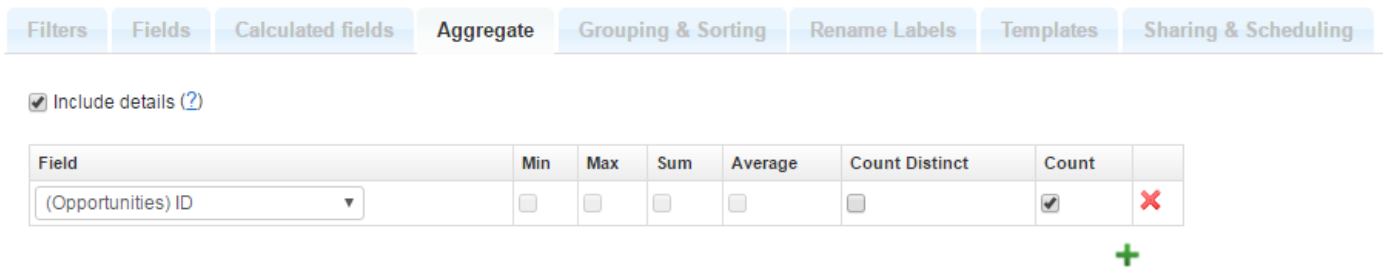
Analytic Reporting Tool PRO has now the solution for all of these cases!

Let's start with the most simple case, where you need to see how many opportunities have converted amount of up to \$100k, how many between \$100 - \$200k and how many exceed \$200k.

First of all you need to have opportunities added to your report and under 'Fields' tab let's select 'Id' for counting and 'Converted amount' for our ranges.



Under 'Aggregate' let's select 'Id' to be counted



'Grouping & Sorting' tab is where you actually set your ranges.

1. After you select any of the Amounts under 'Group by', the checkbox of 'Group by range' will appear. (Be aware that 'Group by range' appears only if the numeric type field is selected, it will not be available for other field types, like text fields and dates.)
2. You need to select the checkbox in order to set your ranges. 'New range' button will appear. Click to the button in order to add a new range:

Include details (?) Pivot (Matrix) (?)

Level	Action	Group by	Sort
1	Group & Sort	(Opportunities) Converted Amount Group by range <input checked="" type="checkbox"/> New range	Converted Amount Ascending Show Top All

3. Now you can identify each range, by entering the amount to start and end with and name your ranges for a better looking report. Returned values will be inclusive, e.g. first range in our sample will include 0 and 100k amount opportunities; second range will not include 100k opportunities, because it is already grouped in the first range. Click 'Preview' to see the result of your settings.

Include details (?) Pivot (Matrix) (?)

Level	Action	Group by	Sort
1	Group & Sort	(Opportunities) Converted Amount Group by range <input checked="" type="checkbox"/> Original Value Start: 0 End: 100000 Range Name: 0-100k Start: 100000 End: 200000 Range Name: 100-200k Start: 200000 End: 3000000 Range Name: 200k and more New range	Converted Amount Ascending Show Top 0

Select summaries to show in this report:

Group	Count(ID)	Sum(Converted Amount)
Converted Amount	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Grand Total	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Preview

Report

Show 100 records per page freeze first 0 columns

Converted Amount range	#	Sum(Converted ...)
0-100k	982	47,206,364.40
100-200k	1,010	150,517,012.00
200k and more	8,034	4,826,500,422.00
Grand Total	10,026	5,024,223,798.40

In this example we can see that we have 982 Opportunities with a converted amount between 0 and 100k and their total converted amount is 47'206'364.40; 1010 opportunities with amount between 100 and 200k etc.

4. If we want, under 'Grouping & Sorting' tab we can also add grouping by month and/or by user etc. – same way as usually.

Include details Pivot (Matrix) Aggregates as column Empty values as 0

Level	Action	Group by	Sort	Position
1	Group & Sort	(Opportunities) Assigned User:	Assigned User: Ascending Show Empty Values <input type="checkbox"/>	Column
2	Group & Sort	(Opportunities) Converted Amount Group by range <input checked="" type="checkbox"/> Original Value Start: 0 End: 100000 Range Name: 0-100k Start: 100000 End: 200000 Range Name: 100-200k Start: 200000 End: 3000000 Range Name: 200k and more	Converted Amount Ascending	Row

! Recommended to keep range as last level, especially if it is Pivot(Matrix) type
! Required to be last level, if selected Range is for other than 'Original Value'

Select summaries to show in this report:

Group	Count(ID)	Sum(Converted Amount)
Assigned User:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Converted Amount	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Grand Total	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[Report](#)

Converted Amount range	Aggregate	Bartholomew Sawyers	Croce Coady	Eva Administrator	Godbout Percy	Hamlett Roop	Johan Lee	Kardos Greenman
0-100tk	#	110.00	101.00	26.00	73.00	104.00	101.00	99.00
0-100tk	Sum(Conv...	5,752,988.00	5,671,254.00	46,896.40	3,755,095.00	5,238,423.00	5,042,478.00	4,466,667.00
100-200tk	#	93.00	102.00		102.00	99.00	99.00	94.00
100-200tk	Sum(Conv...	14,001,550.00	15,497,739.00		15,097,779.00	15,215,350.00	14,900,740.00	14,067,362.00
200tk and more	#	797.00	797.00		825.00	797.00	800.00	807.00
200tk and more	Sum(Conv...	466,535,006.00	474,362,196.00		494,643,869.00	479,754,766.00	495,043,742.00	479,816,996.00

Ranges for aggregated values (i.e. summarized, counted values, etc.)

In our previous examples we added ranges for original values (i.e. for Converted Opportunity Amount). If we need to set ranges for already summarized or counted values, first of all, we need to identify the Group under 'Grouping & Sorting' tab – Sum by User, Month or any other grouping. And only afterwards should we add another group for ranges, because the range of summarized values needs to know this option beforehand in order to perform correctly.

For example, if we want to see which Sales representatives have reached the target of total opportunity amount, which are below, and which ones have exceeded it, we can do the following:

1. First of all, we select 'User' under 'Grouping & sorting' as the first level; next level will be for ranges.
2. We should select a numeric field type and then 'Group by range' checkbox will appear, this should be selected. In our case we will add ranges to Sum of Converted Amount.
3. We need to select 'Sum' (if we want add ranges for Count or other, we can simply select 'Count' here).
4. Identify ranges and their names (red x is there to remove unnecessary ranges, if needed).
5. 'Preview' to see the result (remember to 'Save' / 'Save as' if the result is as expected)

Include details Pivot (Matrix) Aggregates as column Empty values as 0

Level	Action	Group by	Sort	Position
1	Group & Sort	(Opportunities) Assigned User:	Assigned User: Ascending Show Empty Values <input type="checkbox"/>	Row
2	Group & Sort	(Opportunities) Converted Amount		
		Group by range <input checked="" type="checkbox"/> Sum		
		Start: 0 End: 470000000 Range Name: 0-470		
		Start: 470000000 End: 500000000 Range Name: 470-500	Converted Amount	Ascending
		Start: 490000000 End: 500000000 Range Name: 500 and above		



Select summaries to show in this report:

Group	Sum(Converted Amount)
Assigned User:	<input checked="" type="checkbox"/>
Converted Amount	<input checked="" type="checkbox"/>
Grand Total <input checked="" type="checkbox"/> On both sides	<input checked="" type="checkbox"/>

Report

Assigned User:	0-470 Sum(Converted Amount)	470-500 Sum(Conver...	500 and above Sum(C...	Grand Total
Eva Administrator	46,896.40			46,896.40
Bartholomew Sawyers		486,289,544.00		486,289,544.00
Croce Coady		495,531,189.00		495,531,189.00
Kardos Greenman		498,351,025.00		498,351,025.00
Tyus Gatton		493,465,183.00		493,465,183.00
Godbout Percy			513,496,743.00	513,496,743.00
Hamlett Roop			500,208,539.00	500,208,539.00
Johan Lee			514,986,960.00	514,986,960.00
Kraus Prince			508,380,900.00	508,380,900.00
Thurber Copland			511,672,029.00	511,672,029.00
Wear Haynie			501,794,790.00	501,794,790.00
Grand Total	46,896.40	1,973,636,941.00	3,050,539,961.00	5,024,223,798.40

Grouping order matters!

If your report is not a Pivot(Matrix) type and you need ranges for the original values, you can simply add User or Month grouping as the next item under Grouping & Sorting tab.

However, if this is a Pivot (Matrix) type and also, if you need to have ranges for already summarized or counted values, **you should always keep the range as the last item in the 'Grouping & Sorting' tab table.**

SEARCH ADDED FOR USER/GROUP SELECTION ON SHARING & SCHEDULING

As well as working on new features we are always looking to improve our existing functionality and user experience.

In the “Sharing & Scheduling” tab as well as “Mass Sharing & Scheduling” you can filter out Users and Groups for quicker access to the desired options. This makes managing you report sharing permissions and scheduling even easier than before!

^ [Report Editor](#)

Filters Fields Calculated fields Aggregate Grouping & Sorting Rename Labels Templates **Sharing & Scheduling**

Sharing

Update Permissions Allow Drilldown for read only users

Owner:

Start typing ×

User::TyusGatton

Scheduling

Schedule Report

Frequency: Time: : (hh:mm)

Send report as format

XLSX PDF Send link to report

Type to search ×

User::WearHaynie
User::KrausPrince
User::CroceCoady
User::ThurberCopland
User::GodboutPercy
User::BartholomewSawyers

Custom email:

If you have missed the previous updates, you will learn more about them by reading these documents:

http://itsapiens.eu/public/updates/NewFeatures_AnalyticReportingPRO_2017_Jan04_v3.pdf

It covers:

- SNAPSHOT reporting from audit history
- Detailed info on top first/last or min/max grouped items
- Added cities to Geographic Chart
- Count of unique values

http://www.bisapiens.com/public/file/news/2016/NewFeatures_AnalyticReportingPRO_Sept_2016.pdf

It covers:

- ADDING YOUR OWN EXCEL TEMPLATES
- NEW CHART TYPE: AREA CHART
- HORIZONTAL BAR CHART
- ADDITIONAL FILTERS: TEAM, # OF PASSED WEEKS, MONTHS, QUARTERS
- PERMISSIONS TO EDIT SELECTED FILTERS FOR READ-ONLY USERS
- CALCULATED FUNCTION MANUAL EDITING & OTHER IMPROVEMENTS

- ADDITIONAL MODULE ADDING TO ALREADY CREATED REPORTS
- ADDING DATA FROM SUGAR HISTORY AUDIT TO YOUR REPORT

You are welcome to contact our IT Sapiens team at: info@itsapiens.eu for further questions!